

## Individual Tax Return Checklist (Basic)

*To assist Etax Local to prepare your tax return, could you please provide the following information:*

Name: \_\_\_\_\_

Postal Address: \_\_\_\_\_

Phone Numbers: \_\_\_\_\_ Mobile: \_\_\_\_\_

Email address: \_\_\_\_\_

Year of tax return: \_\_\_\_\_

*We'll also need the following records and documents – use our check boxes to help make sure you have everything.*

<b>GENERAL</b>	<b>YES</b>	<b>N/A</b>
Last Year's Income Tax Return	<input type="checkbox"/>	<input type="checkbox"/>
Records of sales and purchases of any shares, business or property	<input type="checkbox"/>	<input type="checkbox"/>
Private Health Insurance Details	<input type="checkbox"/>	<input type="checkbox"/>
Spouse Details	<input type="checkbox"/>	<input type="checkbox"/>
Children's details including D.O.B and evidence of any Centrelink benefits	<input type="checkbox"/>	<input type="checkbox"/>
Bank Details	<input type="checkbox"/>	<input type="checkbox"/>
<b>INCOME</b>	<input type="checkbox"/>	<input type="checkbox"/>
PAYG Summaries	<input type="checkbox"/>	<input type="checkbox"/>
Pensions or Government payments/Allowances	<input type="checkbox"/>	<input type="checkbox"/>
Interest earned for the relevant year from the banks, building societies etc.	<input type="checkbox"/>	<input type="checkbox"/>
Dividend Statements	<input type="checkbox"/>	<input type="checkbox"/>
Details of rental property income	<input type="checkbox"/>	<input type="checkbox"/>
Details of any business income	<input type="checkbox"/>	<input type="checkbox"/>

	YES	N/A
Details of any other income earned	<input type="checkbox"/>	<input type="checkbox"/>
<b>EXPENSES</b>	<input type="checkbox"/>	<input type="checkbox"/>
Work Related Expenses <i>For example: uniform, tools, education, fees etc.</i>	<input type="checkbox"/>	<input type="checkbox"/>
Motor Vehicle Expenses <i>incl. estimation of kilometres if no logbook kept, otherwise logbook and all expense items</i>	<input type="checkbox"/>	<input type="checkbox"/>
Travel Expenses	<input type="checkbox"/>	<input type="checkbox"/>
Investment Expenses <i>For example: bank fees, financial advisors fees, investment borrowings</i>	<input type="checkbox"/>	<input type="checkbox"/>
Rental Property Expenses <i>For example: rates, body corp fees, agent fees, interest on loan, repairs and maintenance (inside and out), travel, water rates, depreciation schedule, etc.)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Cost of managing tax affairs	<input type="checkbox"/>	<input type="checkbox"/>
Charitable donations	<input type="checkbox"/>	<input type="checkbox"/>

***Don't worry if you aren't sure about any of these items and need to ask questions – we'll be happy to help!***

Notes: